



2012 Road Show

Toniq Limited, 67 Riccarton Road, Christchurch, New Zealand Tel : +64 3 3410195 | Fax: +64 3 3410196 | Email: sales@toniq.co.nz
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1



Why a Loyalty Club?

- T Clubs are a great way to grow your customer base and encourage loyalty from your existing customers
- T Add value to the shopping experience and encourage repeat business whilst increasing your foot traffic and sales
- T Loyal customers spend more, stay longer and recommend your business to others
- T Offer affordable and timely discounts / bonuses / specials
- T Boost your marketing opportunities and target the right customers
- T Keep your customers involved, informed and impressed with mail outs, emails or txt messages
- T Find your top customers or even those who have stopped visiting
- T Create your own personalised vouchers for impact
- T Produce vouchers only when required and keep track of them
- T Create plastic loyalty cards containing your business details which promote your business wherever the customers' wallet / purse goes



2



Deciding on Club Options

- T Choose to run a Pharmacy Loyalty Club or specialty clubs such as a Beauty Club, Baby Club, Natural Health Club, etc.
 - T Decide on the club format – dollars, items, points or “coffee card”
 - T Decide which products to include in each club
 - T Decide whether to include discounted items and / or specials
 - T Decide on the reward – a gift voucher? a product? a discount?
 - T Should the reward be instantaneous or available on the next visit?
 - T Decide on the level of spending before the reward is issued
 - T Should you be handing out plastic loyalty ID cards?
- T As an alternative to clubs, or in conjunction with, consider:

AA Smartfuel



FlyBuys



3



Suggested Pharmacy Wide Club

- T This is probably the easiest and best club to setup and run
- T Set the level of spending at a realistic value - maybe \$120 to get a \$10 voucher (8.33%) or \$80 to get a \$5 voucher (6.25%)
- T Maybe set two levels to encourage up selling:
 - T Spend \$80 and get a \$5 voucher
 - T Spend \$120 and get a \$10 voucher“Just spend another \$40 and double your reward”
- T Exclude Prescriptions, Magazines, NZ Post, Film Processing, Hire
- T Exclude discounted items but include specials
- T Issue plastic loyalty ID cards to customers
- T Get a voucher designed which is printed at the time of the customer reaching the bonus (via the receipt printer)
- T Set the voucher expiry to 6 months maybe
- T Train your staff to capture customer's name, address, email, mobile phone number as part of the POS sale process

4

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Customer Loyalty ID Cards

- T 80% of your business will come from 20% of your customers
- T It's harder to gain a new customer than to keep an existing one
- T Use for: Marketing, Advertising, Clubs, Laybys
- T Don't get thrown away like a cardboard coffee card
- T Professional looking cards
- T Standard credit card size
- T Barcoded for fast client selection
- T Multi or Single colour
- T Double sided
- T Use your colours, logos, etc.



- T Costs varying depending on quantity ordered, colours and design

5

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Example Pharmacy Wide Club

- T From the main menu select 5.Clubs then 1.Maintain Clubs

Name: VIP Club

Print on receipt - POS prompt - Permit duplication - HO compulsory - Opening points: 0

Skip levels - Bonus resets level - Bonus always free - Don't update address - Opening value: 0.00

Hide - Dont count disc. items - Dont count specials - Allow merge

Rx points: 0 Club discount - Sale threshold - Purge time: 999 Proximity %: 20

Include all products - No Promotional Mail - Notes

Include Rxs

Levels and bonus settings next page (F11)

Collection type: Excl

Departments: D & P, EziPay, NZ Post, Service Fees

Value	Items	Pts.	Default bonus product	Bonus description
80.00			VIP Voucher \$5.00	Spend \$80 and receive a \$5 voucher
120.00			VIP Voucher \$10.00	Spend \$120 and receive a \$10 voucher
Lev. 3				
Lev. 4				
Lev. 5				
Lev. 6				
Lev. 7				
Lev. 8				

Bonus near message: Customer is within 20% of reaching the bonus - is there anything else they

6



Setting up Voucher / Flexisigns

- T There are a few steps to setting up a Voucher / Flexisign:
 - T Ensure you have a windows receipt printer driver loaded and working on each POS workstation
 - T Create / design a Flexisign (and test that it prints correctly) OR customise a Tonic template
 - T Create a Voucher template
 - T Setup the Voucher product
 - T Link the voucher template to the voucher product
 - T Setup your club to issue the bonus / voucher (if a voucher is your club reward)



- T Note: Vouchers / Flexisigns are separate, chargeable modules

7



Example Vouchers / Flexisigns



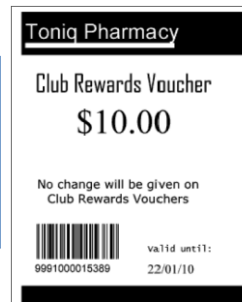
8



Example Vouchers / Flexisigns



Vitamin Club Bonus Voucher



9

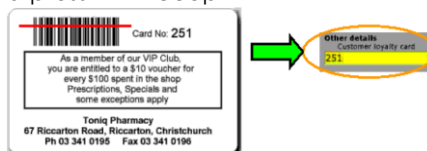


Entering Customer Details

T In POS press F5 Client, select the client then F2 Edit Client

General details Surname: Mouse Title: Mr Sex: M First name: Mickey Address: 67 Riccarton Road Address: Riccarton Address: Christchurch E-mail address: support@toniq.co.nz Post code: Phone: 033410195 Date of birth: 23/09/1966 Mobile: 021344437 Fax: Note: Prompt: POS note: Prompt: No faxes - No promotional mail -	Extra details Account name: Don't ask to link to account Club card details Club cards: Loyalty Club (22481) RESTRICTED MEDICINE (22482) Share card: Other details Customer loyalty card: National loyalty card: 251 Drivers licence: Other card:
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T To scan the unique barcode, press F9 Goto Other, scan the barcode and press F12 Accept



10

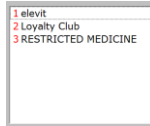


Joining a Customer to a Club

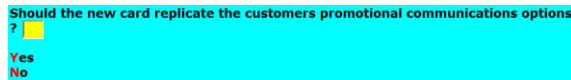
- T In POS press F5 Client, select the client, press F11 Join Club
 - T Note: the client must first have an address

Join Club
F11

- T Select club from the list



- T Check with the customer in regards to promotional mail



- T Alternatively, in POS press F5 Client, select the client, press F2 Edit Client, check the name, address, email, phone, etc.
 - T Press F3 New Card and select the club from the list
 - T Press F12 Accept twice to return to POS



Viewing Customer Club History

- T In POS press F5 Client, select the client, select the desired club with F6 or F7 or F8

Club Card F6 Club Card F7 Club Card F8

Club Cards Bonus

F6 BEAUTY CLUB

F7 CONTACT LENS

F8 Pharmacist Only Medicin

Balance		12 mth	All	Bonus balance: Next level 1 Value \$79.87		Items	Points
Value	\$52.48	\$279.87		L1	\$200		
Items	5	11		L2			
Points				L3			
				L4			
Date	Seller	Invoice	Qty	Description	Price	Points	
18 Feb 12	CAUMBUS	225228	1	M'CARE Nail Shaper:	6.79	0	
19 Oct 11	Seruh Billin	199561	1	SAX L/S Emmy Award	5.00	0	
14 Oct 11	Lau	198724	1	NATIO Top & Base Coat	14.50	0	
29 Apr 11	Sulluy	159579	1	M'CARE Nail Shapers Cushioned Pk2	6.19	0	
29 Apr 11	Sulluy	159579	1	JF FE Secret Weapon Style Cr. 113g	20.00	0	
11 Mar 10	Deves	64189	1	Evolu Cert Org Rosehip Oil 30ml	21.00	0	
11 Mar 10	Deves	64133	1	BEAUTY GIFT VOUCHER	Bonus 0.00	0	
11 Mar 10	Deves	64133	1	CORAL Nail Enamel Glam Pink	6.99	0	
12 Jan 10	Dottmor	50747	1	REVL BLUSHER PINCH ME PLUM FLUSHED 315	5.00	0	
14 Dec 09	Dottmor	44194	1	RICCI Ricci EDP 30ml	86.00	0	
12 Aug 09	Cidnag	12639	1	SHE Nail Varnish Diamond 15ml	12.00	0	



Creating a Mail List

T From the main menu select 5.Clubs, 3.Maintain club cards in bulk

T Select Club and enter selection criteria (further options on page 2)

T Maybe use anyone who has purchased 2 items in the last year

T Check promotional mail flags

T Press F12 Accept

Card criteria	
Card name	
Club	Loyalty Club
Note	

Transaction criteria	
Period	01/01/2011 to / /
Value	to
Items	2 to
Points	to

Allow prom. mail	<input type="checkbox"/>	Allow prom. faxes	<input type="checkbox"/>
Allow prom. texts	<input type="checkbox"/>	Allow prom. Email	<input type="checkbox"/>

13



Creating a Mail List (continued)

T Use F2 Edit List to ADD, REMOVE, or EDIT customers to / from the existing list

T Use F3 Sort list and choose by 1.Tx Value

T You could also choose to sort by 2.Tx items or maybe the current value / items (which is the customers current level towards the bonus

T Note: Tx stands for 'transaction'

T Use F8 Print Labels / F9 Print List / F10 Other, Create Contact List (to send an email or txt message) or F11 Export

T Chose the number of customers to print

Choose
Add more cards in bulk
Remove cards in bulk
Edit list card by card

Sort by?
Name
Value
Points
Items
Level
1 Tx value
2 Tx items
3 Tx points
Sort key
Club

Print Labels	Print List	Other	Export
F8	F9	F10	F11

2284 club cards selected.
1 Print all
2 Select beginning club card
3 Print selected and following
4 Print first ...
5 Cancel

14



Further Information on Clubs



- T Read the Toniq Manuals – found on your Windows Start Menu under 'All Programs' or 'Programs'
- T Manuals to read include:
 - T VIP Clubs
 - T Clubs
 - T Club Maintenance Reporting
 - T POS Selling
 - T Contact Clients
 - T Flexisigns
 - T Voucher Management
- T Phone Toniq Support on 03 341 0195 or email support@toniq.co.nz

15



Regular Tasks (Dead Stock)

T This report will help you to find old stock that you have not sold (excluding newly received stock) for the specified period - stock that you may want to special off to clear, etc. :

- T From the main menu select 2.Stock control, 3.Stock maintenance, 1.Maintain products in bulk 
- T Press F8 Dead Stock and when asked for the number of days enter 180 (for 6 months) or 365 (for a year)
- T (optional) to report on a specific group, department, etc. select it in the appropriate field 
- T Press F12 Accept then F3 Sort then 1 Alpha

Sort by? 
1 Alpha
2 Dept/Alpha

16

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Regular Tasks (Dead Stock continued)

- T What to do about dead stock?
 - T Do a stock take to confirm the SOH
 - T Special stock at half price
 - T Publish a list of dead stock and distribute to salespeople - anyone selling an item gets a commission?
 - T Use specialist auction companies or websites such as eBay, Trade Me or Sella
 - T Donate to a charity (maybe a tax write-off?)
 - T Negotiate with suppliers for return or exchange
 - T Create a gift basket to sell or raffle off
 - T Bundle with other products as a 'freebee'
 - T Give away to loyal customers to create goodwill



17

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Regular Tasks (Zero Sell Price)

T This report will allow you to find and fix in stock products with NO sell price:

- T From the main menu select 2.Stock control, 3.Stock maintenance, 1.Maintain products in bulk
- T Tick the 'In Stock' box and press F11 Next Page
- T In the field 'Sell Price' and column 'Under or Equal' enter '0.01'
- T Press F11 Next Page then F12 Accept

	Under or Equal	Over
Sell Price:	0.01	

- T What to do about zero priced items?
 - T Edit the product(s) and check the 'reprice method' and / or 'standard cost' and / or 'markup %'
 - T Press F3 Reprice to calculate a new sell price

Std cost	7.19
Reprice markup %	60.00%
Sell price	0.00
Last cost	5.3933
Prev avg. cost	7.19
Reprice method	RRP

18



Regular Tasks (Low Mark-up from Cost)

T This report will check for items that are not currently set up to provide at least your minimum desired mark-up:

T From the main menu select 2.Stock control, 3.Stock maintenance, 1.Maintain products in bulk

T Tick the 'In Stock' box and press F11 Next Page

T In the field 'Mark-up from std cost' and column 'Under or Equal' enter '45' (or your desired minimum percentage)

T Press F11 Next Page then F12 Accept

	Under or Equal	Over
Sell Price:		
Std Cost:		
Last Cost:		
Mark-up from std cost:	45	

T What to do about low mark-up items?

T Edit the product(s) and check the 'reprice method' and / or 'standard cost' and / or 'markup %'

T Press F3 Reprice to calculate a new sell price

Std cost	7.19
Reprice markup %	60.00%
Sell price	0.00
Last cost	5.3933
Prev avg. cost	7.19
Reprice method	RRP

19



Regular Tasks (GP on items sold)

T This report provides sales and profit information giving you the opportunity to fix pricing errors:

T From the main menu select 6.Reports, 2.Sales reports, 1.Sales analysis

T Tick the box 'Show gross profit'

Show gross profit

T Tick 'Product' field in the column 'List by'

Product

T In the field 'Ranking' press the spacebar and select "Bot Markup%"

Ranking Bot Markup%

T Press F12 Accept, F10 View pages or F12 Print

PCode	Product	Items	Disc (\$)	Sales (\$)	redits (\$)	Ave Item	GP (\$)	GP/Item	GP
			inc GST	inc GST	inc GST	(\$/inc GST)	inc GST	(\$/inc GST)	(%)
2157403	TRILGY Rose Hand Cream 100ml	1	-	-	-	-	-14	-13.67	---
80802	NATTO Tanning Wipes	1	-	5	-	5.00	-3	-2.87	-66.0
90150	NATTO Men Age Renewal Moisturiser	1	-	10	-	10.25	-2	-2.23	-25.0

T What to do about potential pricing errors?

T Edit the product(s) and check the 'reprice method' and / or 'standard cost' and / or 'markup %'

T Note: This is a guide only and the KIR / KPI report is more accurate

20



Regular Tasks (No Standard Pricelist)

T This report will check for items that are not currently being updated by pricelists:

T From the main menu select 2.Stock control, 3.Stock maintenance, 1.Maintain products in bulk

T Tick the box 'None' beside 'Std price list' and press F12 Accept

T Press F2 Edit List then 'R' for 'Remove items from list'

T Tick the box 'None' beside 'On price list' and press F12 Accept

T What to do about no standard pricelist items?

T Edit the product(s), press F5 Price Lists, note the pricelist you wish to use to update the product from, F12 Accept

T In the field 'Std pricelist' press the spacebar and select the desired pricelist

21



Regular Tasks (Price Variances)

T This report presents an analysis of price variances comparing your sell prices to the sell check data:

T From the main menu select 6.Reports, 2.Sales reports, 4.Sell-Check reports 1.Sell-Check variance

T In the field 'Percentage variance' enter the desired variance – maybe 30

(Note: variance include sales rates and prices)

T (optional) select a department, group, etc. on the left to narrow down the report to a particular section

T Press F12 Accept, F10 View pages or F12 Print

T What to do about price variances?

T Review the report and alter prices accordingly

T Note: Sell-Check is a separate, chargeable module

22



Regular Tasks (Big Sellers Elsewhere)

T This report gives an idea of what other pharmacies are selling that you have not sold (and by default, have not stocked):

T From the main menu select 6.Reports, 2.Sales reports, 4.Sell-Check reports 4.Big sellers elsewhere

T In the field 'Percentage selling' enter "80"
(or your desired percentage)

T In the field 'Sellcheck sales' enter "3"
(or your desired minimum)

Look back months	12
Percentage selling	80
Sellcheck sales >	3

T (optional) select a department, group, etc. on the left to narrow down the report to a particular section

T Press F12 Accept, F10 View pages or F12 Print

Product Description	PLU Code	Current Sell \$	Median \$ All	Sales All Pcys	% Pcys selling
COMV Manuka Honey Loz. L&H 12	478887	\$7.99	\$7.50	96	82%
EGO Sebitar Solution 250ml	534021	\$18.99	\$19.50	18	83%
PANADEINE TABS 24	663875	\$13.99	\$13.50	117	81%

T Note: Sell-Check is a separate, chargeable module

23



New Retail Features in 4.29

T Website shortcuts:

T Accessed from F1 Help, F9 Choose URL

Toniq page	CDC	Pro pharma	QVS	Douglas	Choose URL	Edit URL	Print	Accept Details
F2	F3	F4	F5	F6	F9	F10	F11	F12

T Can be customised using F10 Edit URL

T Address lookup to improve spelling and consistency:

T When adding / editing a client enter some information on the first address line then press F7 Lookup Address

Number and Street	Suburb/town/city/district	Post code
100 queen st		
100 QUEEN STREET, Auckland Central, Auckland 1010		
100 QUEEN STREET, Masterton, Masterton District 5810		
100 QUEEN STREET, North Dunedin, Dunedin City 9016		
100 QUEEN STREET, Northcote Point, Auckland 0627		
100 QUEEN STREET, Waimate, Waimate District 7924		
100 QUEEN STREET, Waiuku, Auckland 2123		

T Note: Data is from the electoral roll of physical addresses

24



New Retail Features in 4.29 (continued)

T Customer details on the first page:

T When adding / editing a client the email, mobile, etc. are now on the first page

E-mail address	support@toniq.co.nz		
Post code		Phone	033410195
Date of birth	18/07/1938	Mobile	
		Fax	033410196

T Add images to your receipts:

T From the main menu 7.Administration, 1.Setup, 2.Workstation configuration, 2.Receipt options, F11 Next Page

T Press F6 Header or F7 Footer then F4 Load

T Note: Printing images requires:

- T A windows receipt printer driver
- T The image must be in the .BMP (bitmap) format



25



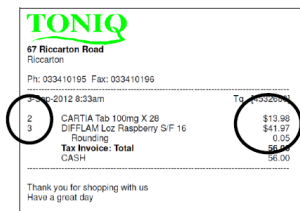
New Retail Features in 4.29 (continued)

T New receipt layout to show GST, quantity and unit price:

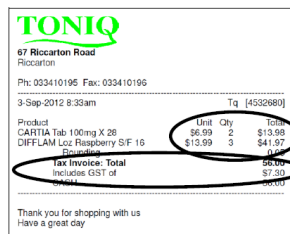
T From the main menu 7.Administration, 1.Setup, 2.Workstation configuration, 2.Receipt options

T Tick 'Detailed receipt' down the bottom right Detailed receipt

Current receipt layout



New Detailed receipt layout



T Note: These settings are workstation specific – to copy to other workstations press F10 Other, Replicate settings to all workstations

26



New Retail Features in 4.29 (continued)

- T New eShopLink integration with shopify.com:
 - T Automatic product updates out to, and sales retrieval from, your online store
 - T Reduce the double handling and improve accuracy
 - T Proven integration with Shopify e-commerce system
 - T First 2 months Toniq and Shopify fees free – contact Toniq!



- T Note: eShopLink is a separate, chargeable module

27



New Retail Features in 4.29 (continued)

- T Handling Replacement products:
 - T When a supplier advises Toniq of a replacement product, the pricelist updates the database when you run pricelist updates
 - T To setup a manual product replacement, call up the old (replaced) product, F11 Next Page, F11 Next Page
 - T In the field 'Replacement product' select the new (replacement) product
 - T Press F11 Next Page, F11 Next Page, F12 Accept and answer 'Yes' to stop ordering the old (replaced) product

- T Setup Club default 'Opt in' flags for promotional mail:
 - T From the main menu select 5.Clubs, 1.Maintain clubs, select Club, F11 Next Page
 - T Tick the desired boxes to have the flags unset by default for all new club cards

Opt in Email	<input type="checkbox"/>
Opt in mail	<input type="checkbox"/>
Opt in text	<input type="checkbox"/>
Opt in fax	<input type="checkbox"/>

28

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Modules / Services

- T Southern Cross Easy-Claim - ph 0800 700 053
 - T Allows members, presenting a valid card, to have the fees paid directly and immediately to the pharmacy rather than members making claims and being out of pocket
 - T An extra service at no cost to your pharmacy
- T drugIDnz – contact Toniaq 03 341 0195
 - T Accurate medicine photos are stored in Toniaq and displayed while you are dispensing
 - T They can be printed on Check Sheets and Charts
 - T Cost - \$250 and \$12 per month (plus GST)
- T Toniaq Vault – contact Toniaq 03 341 0195
 - T Multiple, automated offsite backups
 - T Save time, improve reliability and security
 - T Only \$1 a day (plus GST)



29

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ARRC (Aged Related Residential Care)

- T From July 1st 2012, all patients must be in an approved institution to receive the correct payment from Ministry of Health Sector Services:
 - T Select a patient in script entry, F2 Edit Patient, F11 Next page
 - T Select the institution and optionally room, debtor account and the 'Charge Rx's directly to debtor accounts' or 'Prompt debtor account' options
- T Institutions must be setup correctly – from the main menu select 5.Dosepack, 7.Institution maintenance, select institution:
 - T Ensure the boxes 'Three monthly CC' and 'ARRC institution' are ticked
 - T Check other options such as 'Name', 'Address', 'Default foil type', 'Default foil start day', 'Default Rx Cycle'
 - T Note: For a list of Registered ARRC facilities refer to the Toniaq Green Papers webpage (press F4 at the main menu)

Dosepack Details	
Institution	Auckland Prison
Room	
Debtor account	
<input type="checkbox"/> Charge Rx's directly to debtor account	
<input type="checkbox"/> Prompt debtor account	

<input type="checkbox"/> Three monthly CC
<input type="checkbox"/> Print PRN admin record label
<input type="checkbox"/> Copy note when copying
<input type="checkbox"/> Don't print 'We owe you' label
<input type="checkbox"/> Ask before billing manual scripts
<input type="checkbox"/> Print safe dispensing alerts
<input type="checkbox"/> Use 'Allergy' word on charts
<input type="checkbox"/> ARRC institution

30



ARRC (continued)

T Add ARRC institutions to a group (to assist with LTC reviews and reporting) – from the main menu select 5.Dosepack, 9.Other, 1.Edit institution groups:

T Press [spacebar] to see existing groups and select ARRC or if no ARRC group exists press F3 Add

Institution group
Name ARRC

T Ensure the name is "ARRC"

T Press F5 Add, highlight the desired institution and press F3 Include

T Repeat for all ARRC institutions and press F12 Accept

T Note: it could be useful to create a 'Non ARRC' group for the remaining institutions (to exclude from reports, etc.)

T Print a list of patients in an institution:

T From the main menu select 9.Other, 2.Bulk edit patients, select your institution and press F12

Institution

T Press F8 Print list and check names, addresses, NHI number

31



LTC Basics

T Who can be assessed?

T Patients not living in registered homes (ARRC's) who have at least one long term condition (2 points each) AND an identifiable adherence issue (10 pts). (Note: not prisoners)

T Existing NASC and MUR's may indicate previous assessment / adherence issues (10 points)

T Do not proceed any further unless there is an adherence issue

T Note: Patients must score at least 20 points and have a valid NHI to be eligible

T The patients current LTC status and score is shown in the main dispensing screen under the patients address and details

LTC Status: Eligibility in progress

Conditions **LTC score 33 (A10, L8, O15)**

32



Key points of the LTC evaluation

T Adherence

T Adherence is scored on pharmacy based information (patient history) OR an existing NASC or MUR's

T Adherence is regarded as being more than 80% of medicine picked up over the last 6 months

T Adherence can also be scored on patient factors (disability, health literacy, etc.) or information from other sources (family, GP, etc.)

1	LTC PF: less than 80% pickup of meds in last 6 mnths (prescribed doses)
2	LTC PF: not taking medicines but picking up more than 80%
3	LTC PF: cognitive impairment
4	LTC PF: complex medicines regimen
5	LTC PF: inappropriate overuse of medicines
6	LTC PF: intellectual disability
7	LTC PF: physical disability
8	LTC PF: poor health literacy
9	LTC PF: unstable health status

33



Key points of the LTC evaluation (continued)

T Long Term Conditions

T There are 28 conditions that qualify for eligibility

T Long Term Conditions (prefixed with LTC) score 2 points each up to a maximum of 10

T Mental Health Disorders (prefixed with LTCMH) score 10 points each up to a maximum of 10

T Infectious Diseases (prefixed with LTCID) score 10 points each up to a maximum of 10

T Patient Factors (prefixed with LTCPF) score 10 points each up to a maximum of 10

1	LTC: Myocardial infarction or stroke (previous history of)
2	LTC: Organ replacement (not renal)
3	LTC: Osteoporosis
4	LTC: Parkinsonism
5	LTC: Systemic Cancer
6	LTCID: Hepatitis
7	LTCID: HIV
8	LTCID: Leprosy
9	LTCID: Malarial infection

34



Key points of the LTC evaluation (continued)

T Polypharmacy

T Total number of regularly prescribed medicines

T Score 5 points if there are 5 to 8 regular medicines, 10 points if there are 9 or more regular medicines

1	LTCID: Tuberculosis
2	LTCMH: Bipolar disorder
3	LTCMH: Risk of Harm to self or others
4	LTCMH: Schizophrenia
5	LTCPC: palliative care
6	LTCPP: 5 to 8 regular medicines
7	LTCPP: 9 or more regular medicines
8	Abnormal EKG
9	Achlorhydria

T Hospital Admissions

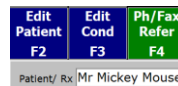
T Score 5 points for each admission not related to surgical or accident (use the LTC Sleuth to get this figure)



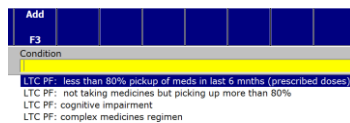
LTC Evaluations (Adding Conditions)

T How do I complete the evaluation?

T Load LTC conditions as patients present prescriptions (press F3 Edit Cond after entering the patients name in prescription entry)



T Highlight the desired condition and press F3 Add



T All LTC eligibility conditions and scoring categories are on the list (except hospital admissions and high risk medicines)

T Note: Use the LTC Sleuth to generate an Adherence score (Collect %), Regular medicines score (Regular medicines count) and to check for possible hospital admissions (doctors with an address of 'hospital')



LTC Evaluations (Adding Conditions continued)

T Where the patient has recent dispensing for a medicine, that indicates a particular condition, these are shown as the list of conditions is traversed

6	LTC: Hyperlipidemia
7	LTC: Hypertension
8	LTC: Ischaemic/coronary heart disease
9	LTC: Myocardial infarction or stroke (previous history of)

Dispensing indicate possible condition:
 13/04/12 2330498/3 BETALOC 47.5mg CR Tablets
 13/04/12 2330492/3 CARDIZEM 120mg CD Capsules

T The patient's currently loaded conditions are shown and an LTC score calculated automatically

T Note: The scores in the example shown are:

- T 'A' indicates Adherence
- T 'L' indicates Long Term Conditions
- T 'O' indicates Other categories (such as Polypharmacy)

LTC score 33 (A10, L8, O15)	
Condition	Added
LTC PF: less than 80% pickup of m	03/10/12
LTC PF: poor health literacy	03/10/12
LTC: Anxiety and Depression	03/10/12
LTC: Atrial fibrillation or cardiac arr	03/10/12
LTC: Hyperlipidemia	03/10/12
LTC: Hypertension	03/10/12
LTCMH: Risk of Harm to self or othe	03/10/12
LTCPP: 5 to 8 regular medicines	03/10/12

37



LTC Evaluations (High Risk Medicines)

T Those are shown (and scored) in the patient history grid and are coded according to the official 6 categories

Omeprazole	20mg	Capsul						30	30	5/12
PRADAXA	110mg bpk	Capsul						30		
CARDIZEM	240mg CD	Capsul							30	5/12
High Risk 5 (AC)										
(AC) PRADAXA	110mg	...30	Mnf	Date	Rep	Expiry	Doct	Rx / Ins#		
								Lum	2419503/0	
1t mane./a. /11./9~								Safe Dispensing Alert.\$0.00 CT/SP:0/DI		

T In the example above, Pradaxa is the high risk Anticoagulant (AC) and scores 5 points

T Note: For a list of codes and categories press F1 Help

T High risk medicines are not included in the LTC conditions shown under the patient details but ARE included automatically on the evaluation form

Conditions	LTC score 33 (A10, L8, O15)
	LTC PF: less than 80% pickup of meds ...
	LTC PF: poor health literacy
	LTC: Anxiety and Depression
	LTC: Atrial fibrillation or cardiac arrhyth ...
	LTC: Hyperlipidemia, LTC: Hypertension
	LTCMH: Risk of Harm to self or others
	LTCPP: 5 to 8 regular medicines

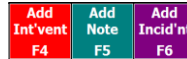
38



LTC Evaluations (Completing the form)

T How do I complete the evaluation form?

T Use Patient Notes - F10 Other, Open patient diary, F5 Add Note



T Use either the Pharmacy specific template (F6 Load Template) or the generic template (F10 Other, 3.Load from template file .WPT, LTC2 Evaluation v14)

TQ LTC1 Screening v14.wpt 26/09/12 10:33:50
TQ LTC2 Evaluation v14.wpt 26/09/12 10:34:36
TQ LTC3 Medicines manag... 26/09/12 10:34:56
TQ LTC4 Med Mngmnt Acti... 26/09/12 10:36:14
TQ LTC5 Registration v14.... 26/09/12 10:42:52

T Press F3 Edit Note and complete and store this within Tonic



T Note: The template will populate automatically based on the patients detail and conditions loaded – if they are not correct, escape out without saving, correct the details / conditions and start the form again

39



LTC Evaluations (Completing the form continued)

T Extra information you may be required to enter includes:

T Adherence information source

Record on information source below, unless scoring is due to an MUR or NASC InterRAI Q4 Assessment.
Patient: Family: Pharmacy record: Discharge report: GP:
Other:

T Hospital admissions (remembering to add any points scored here to the automatic scoring total)

VIII. Hospital Admissions:
Medical inpatient admissions in the preceding 12 months. 5 for each medical admission related to LTC's
(No score for surgical or accident admission)

T Complete the 'Eligibility' line at the bottom of the form

Eligibility as at 03/10/12 10:06 (must score 20 or more)	Eligible?	Total Score
Mickey Mouse NHI: VMR7654	Yes	38

T Press F12 Accept and change the 'Status' of the note as appropriate

Status Complete

T Note: Use F5 View History to view patient history grid



40



Creating Pharmacy Specific Templates

T Take the standard 'Toniq' templates and customise for your pharmacy to include extra details such as 'claim no.':

T From the main menu select 9.Other, 4.Edit note templates, F3 Add

T Press F10 Other, 4.Load from template (.WPT), select the desire template to alter, and amend as desired

T Give the template anew name (e.g. xxx Pharmacy LTC2 Evaluation) and press F12 Accept when done

- Choose other option**
- 1 Save to RTF file
 - 2 Load from RTF file
 - 3 Save to template file (.WPT)
 - 4 Load from template file (.WPT)

Name **Craig's Pharmacy LTC2 Evaluation v14**

Patient Score: (over 20 = eligible) LTC2 Service Patient Evaluation v14b

Patient name	<FIRST_NAME> <LAST_NAME>	Pharmacy	<PHARMACY>
Patient fore	<FNAME>	Phone	<PHARMACY_PHONE>
Patient DOB	<DOB>	Fax	<PHARMACY_FAX>
Usual Dr Name	<USUALDOCTOR>	Address	<PHARMACY_ADDR_T1>
Registration Number	<REGISTRATION_NUMBER>	Classification	<PHARMACY_ADDR_C2>
Assessment Date	<NOTE_DATE>		

T Note: These templates are quickly accessed in patient notes using F6 Load Template (rather than F10, etc.)

Load Template F6



LTC Requirements

T What must the patient do?

T Sign the registration form (and agree to the privacy statement)

T Either load and print the LTC5 Registration template (Toniq will automatically fill it in with the basic patient details) OR manually complete the DHB form

T Note: Ensure the patient details (such as 'Ethnicity' are correct

Description	Mr Mickey Mouse
Importance	Normal
Status	In progress
Patient	Mr Mickey Mouse
Staff	Toniq
Created:	03/10/12 10:41

REGISTRATION - LONG TERM CONDITIONS PHARMACY SERVICE			
PATIENT INFO		PHARMACY/CLINIC	
Name	Mickey	Family name	Mouse
Sex	Male	Other names	
Date of birth	23/09/1966	Suburb	
Ethnicity	European	Place of birth	
Physical address	Street 67 Riccarton Road	Pharmaceutical Subsidy Card	136764
	Suburb Riccarton	Community Services Card	136764 (expiry unknown)
	City/Town Christchurch		
	Postcode 8021		
Postal address		High User Health Card	
Contact Phone	Home 0334 501395	Work 021 944437	Email support@toniq.co.nz

T Note: Remember to change the status of the note (the registration form) to 'Complete'

T What next?

T Set the patient's LTC Start date (F2 Edit patient, F11 Next page)

LTC start date	03/10/12	End date	/ /
LTC status	Eligibility in progress		
LTC contract			
No interaction c			
Alpha sort	<ol style="list-style-type: none"> 1 Eligibility in progress 2 Patient consent needed 3 Medication plan in progress 4 Complete 5 Other 		
Send bill			

T To keep track of the patient's progress through the various stages, use the 'LTC status' field (this can also be reported on)

T Once this date is set, script items are claimed as being supplied under the LTC service

T Note: LTC payments from the MOH do not start until 1st February 2013 (at which time the transition payment is reduced and a core service fee introduced)

T What else do I need to do?

T If eligible, complete the LTC3 Medicine Management Plan Assessment and store within Toniaq

T Note: Remember to change the status of the note (the management plan) to 'Complete'

T Create a medicines management action plan in agreement with the patient (LTC4 template)

T Note: These can be done at a later date

T Note: Sending patient information over the Internet, by fax, or in an email, may breach the Health Information Privacy Code 1994

(www.privacy.org.nz)

Would you send your credit card details in an email? Think WINZI!

T Patient consent is required before emailing information



TONIQ

LTC Extras

- T Why bother doing evaluations now?
 - T If they are spread out across the year, annual re-evaluation bottlenecks (a requirement) will be avoided
 - T Also think about staffing during the busy Christmas period and January holidays
- T Anything else I should be doing?
 - T Record interactions with patients via the notes (with a patient or patient history on the screen press F10 Other than 'Open patient diary', F5 Add Note) eg: "Offered to synchronise medicines – patient resistant"
 - T Pharmacy technicians / interns can be the 'experts' in the LTC service but all work needs to be checked and supervised by a pharmacist – use the 'LTC status' on page 2 of the patient details to manage




45

TONIQ

Using the LTC Sleuth

T The LTC Sleuth will scan your database and find 'suspects' who are probably eligible for the LTC service or use it to quickly generate intelligent scores for individual patients

Review Date: 3/10/2012	Show if patient has:
Patient NHI:	<input checked="" type="checkbox"/> Adherence score
Patient note:	<input type="checkbox"/> At least one LTC
<input type="checkbox"/> Exclude if note found	<input checked="" type="checkbox"/> Overall score of at least 20
	<input type="checkbox"/> Include CC patients below minimum score
Calculate Eligibility	Apply Filter

- T Some patients are automatically excluded such as those already enrolled or those in an ARRC institution
- T To access, click on the Windows Start button and  LTC Sleuth under 'Programs' or 'All Programs' click on 'LTC Sleuth'
- T Note: the LTC Sleuth is a guide only and Tonic accepts no liability

46



Using the LTC Sleuth (for an individual)

T To generate a score for an individual patient:

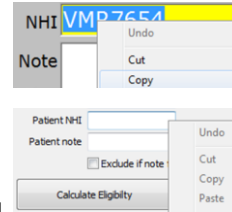
T Copy the patients NHI number by using the mouse to highlight it in the patient details screen, right click on the highlighted text and select 'Copy'

T Now in the LTC Sleuth right click in the 'Patient NHI' field and select 'Paste'

T Click the 'Calculate Eligibility' button

T The patients LTC scores are now displayed

T Note: It is useful to click the 'Hide Columns' button so that only the summary is displayed



Lastname	First Names	NHI	Age	Adherence Total	LTC Score	Other Total	Overall Total	Eligibility	CC	Further Investigation
Duck	Donald	PYV7654	74	10	10	25	45	Eligible?	CC	

47



LTC Training Videos

T Familiarise you and your staff by following the guided online demonstrations

T There are two training videos available:

T Completing LTC Assessments

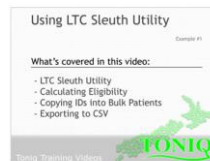
T Using the LTC Sleuth

T Accessed via the Green Papers webpage (press F4 at the main menu – bottom right hand corner)

- dispensary
- Digital Cert1 - Basics
- Digital Cert2 - Renewal
- Digital Cert3 - New
- Setup for New Service codes
- STOCKTAKING
- NEW** [Toniq Training Videos](#)



This video shows how to add patient LTC Forms, then fill them out based on the patient history.



This video shows how the LTC Sleuth Utility calculates eligibility, and how this generated list of potential LTC patients can then be used.

T Note: New videos coming soon for version 4.29

48



Potential LTC Patients

T Potentially, patients over 60, who have had 60 prescriptions in the last 6 months, are LTC candidates (you may like to use other criteria):

T From the main menu select 9.Other, 2.Bulk edit patients

T Enter a script period looking back 6 months and items from 60

T Enter the age from 60

T Press F12 Accept, F2 Edit List, Remove patients in bulk

T Select the 'ARRC' institution group, F12 Accept

T Press F3 Sort, 4.Items then again F3 Sort, 4.Items

T Now press F2 Edit List, Edit list patient by patient

T To undertake evaluations, add conditions, etc. Use:

T F6 Open Diary

T F5 View History

T F3 Edit Condition

T F2 Edit Patient

Period	01/03/2012	to	/ /
Value		to	
Items	60	to	

Age	60	to	
-----	----	----	--

Institution group	ARRC
-------------------	------

Edit Patient	Edit Cond		View History	Open Diary
F2	F3		F5	F6

49



Finding Enrolled LTC Patients

T To create a list (or get an indication of how many) LTC patients:

T From the main menu select 9.Other, 2.Bulk edit patients, F11 Next Page

T In the field "LTC at date" enter today's date

LTC at date	/ /
-------------	-----

T Press F11 Next Page, F11 Next Page, F12 Accept

T The total number of patients is displayed in the top right hand corner

Print List	Contact Clients			Accept Details
F8	F9			F12

3 patients selected

T The list can be printed using F8 or sent to a contact list using F9

50



Considerations under the new contract

- T Turn off CRC's and use the original prescriptions
- T Reduce repeats as much as possible and follow stat rules
- T Review your fees / charges in regards to blister packs, faxes, WINZ reports, deliveries, interventions, etc. What services are you providing that you should be charging for?
- T Avoid owes – treat them as a hold script and dispense another day when the stock arrives (assuming the customer is happy to come back)
- T Turn off 'we owe you' labels
- T Review your ordering procedures ensuring you are maximising your terms of trade including: outer pack discounts, overnight order discount, prompt payment discounts, direct supplier deals
- T Setup companion selling prompts for retail items on appropriate prescription medicines
- T Review your NSS and OTC pricing parameters

51



Considerations under the new contract (continued)

- T Ensure you are using and your customers (and staff) know about the Southern Cross Easy-Claim service
- T Update your SOP's taking into consideration LTC
- T Sign up for the Toniq Direct Debit discount (\$7 per month) and annual fee discount (5%)
- T Review your debtor, temporary and layby account policies (maybe add account / overdue fees?)
- T Add a transaction fee to low value prescriptions paid by credit card (this can be setup in retail but you must advise the customer)
- T Review your policies in regards to when prescriptions can be altered / corrected without the need to involve the doctor
- T Advise customers (and staff) about the change in co-payment on January 1st 2013 – it is not an extra \$2 profit for pharmacies!
- T Consider running two copies of Toniq (and / or two monitors) on the same PC

52



Considerations under the new contract (continued)

T Ensure you have read and understood the changes with this new contract – in particular the change in time to claim prescriptions:

T The time you have to electronically claim original prescriptions has been reduced from 6 months to 3 months

T These will show in your claims with the following errors:

T Error 148: Subsidy expired on this prescription

T Error 847: Late claim item submitted after 6 months

T This also applies to unreceived telephone, fax and referred prescriptions / owes

T You are advised to check your procedures and make appropriate changes to your processes



53



New Dispensary Features in 4.29

T Website shortcuts:

T Accessed from F1 Help, F9 Choose URL

Special Auth	MIMs	MedInfo	NHI Lookup	CDC	Pro pharma	Toniq page	Choose URL	Edit URL	Print	Accept Details
F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12

T Can be customised using F10 Edit URL

T Address lookup to improve spelling and consistency:

T When adding / editing a patient enter some information on the first address line then press F7 Lookup Address

Number and Street	Suburb/town/city/district	Post code
100 queen st		
100 QUEEN STREET, Auckland Central, Auckland 1010		
100 QUEEN STREET, Masterton, Masterton District 5810		
100 QUEEN STREET, North Dunedin, Dunedin City 9016		
100 QUEEN STREET, Northcote Point, Auckland 0627		
100 QUEEN STREET, Waimate, Waimate District 7924		
100 QUEEN STREET, Waiuku, Auckland 2123		

T Note: Data is from the electoral roll of physical addresses

54



New Dispensary Features in 4.29 (continued)

T New Reports (from the main menu
3.Reports, 1.Business analysis):

Business analysis reports menu	
1.	Dispensary summary
2.	Core patients analysis

T Dispensary Summary:

- T New selection criteria (institution groups)
- T Indication of Prescriptions with negative subsidy

T Core patients analysis:

- T Analysis of patient visits per day and average items
- T Excludes LTC patients, ARRC, special services, etc.

T Quick access to Prescription Details Report
and highlighting Dosepack prescriptions

Please select history option
Select repeats due within (days)
Highlights prescriptions in dosepacks
Prescription details report

T When viewing the patient history grid press F10 Other

T Note: You can permanently turn on the highlighting of dosepack
prescriptions by going to 7.Administration, 1.Setup, 5.General options,
F11 Next Page,

Highlight dosepack prescriptions on history grid